



OSD EVM Data Requirements

Integrated Program Management Report (IPMR) Data Item Description (DID) & Work Breakdown Structures (WBS)

Sep 2012



Outline

- ▶ PARCA Overview
 - PARCA EVM Organization
 - EVM Responsibilities

- ▶ EVM Requirements
 - Authorities
 - WBS Development

- ▶ IPMR Overview
 - Information by Format

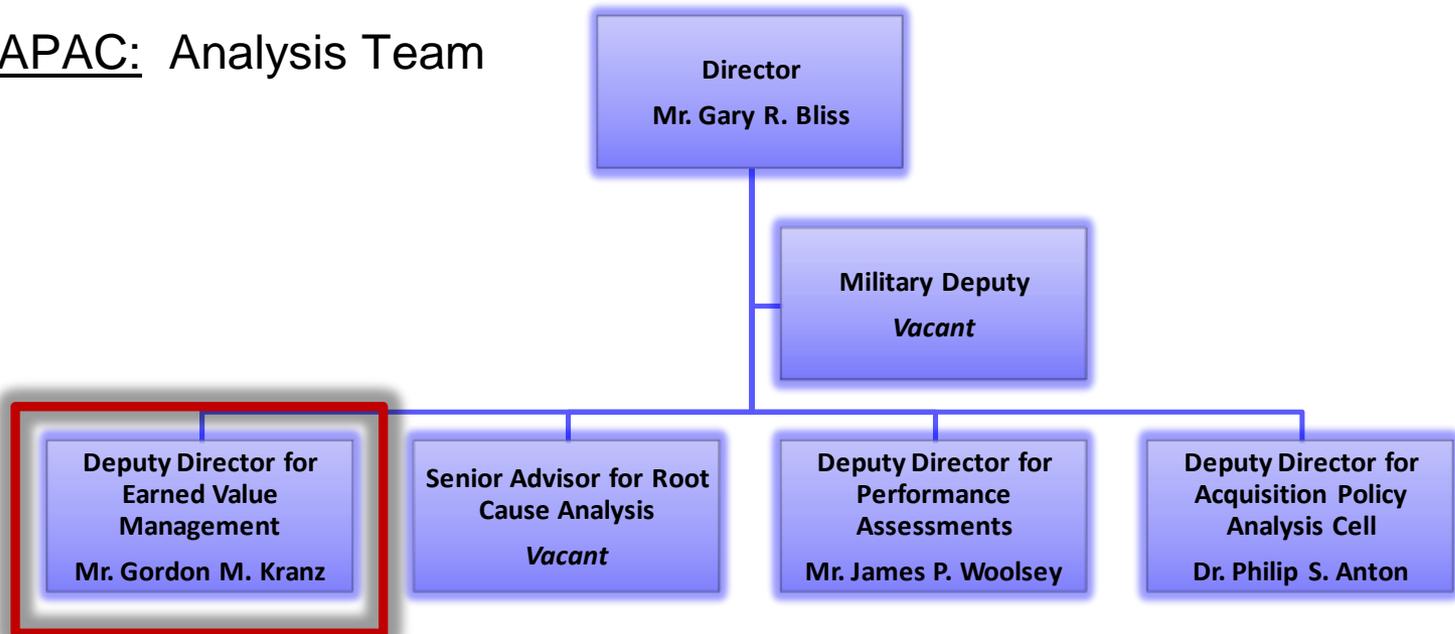
- ▶ EVM Data Requirements
 - Tailoring
 - Draft IPMR CDRL



PARCA Divisions

▶ PARCA has four divisions

1. PARCA Performance Assessments (PA): Program assessments and DAES selection
2. Root Cause Analysis: Nunn McCurdy breach analysis
3. PARCA EVM: OSD EVM Policy holder
4. APAC: Analysis Team





PARCA EVM Vision

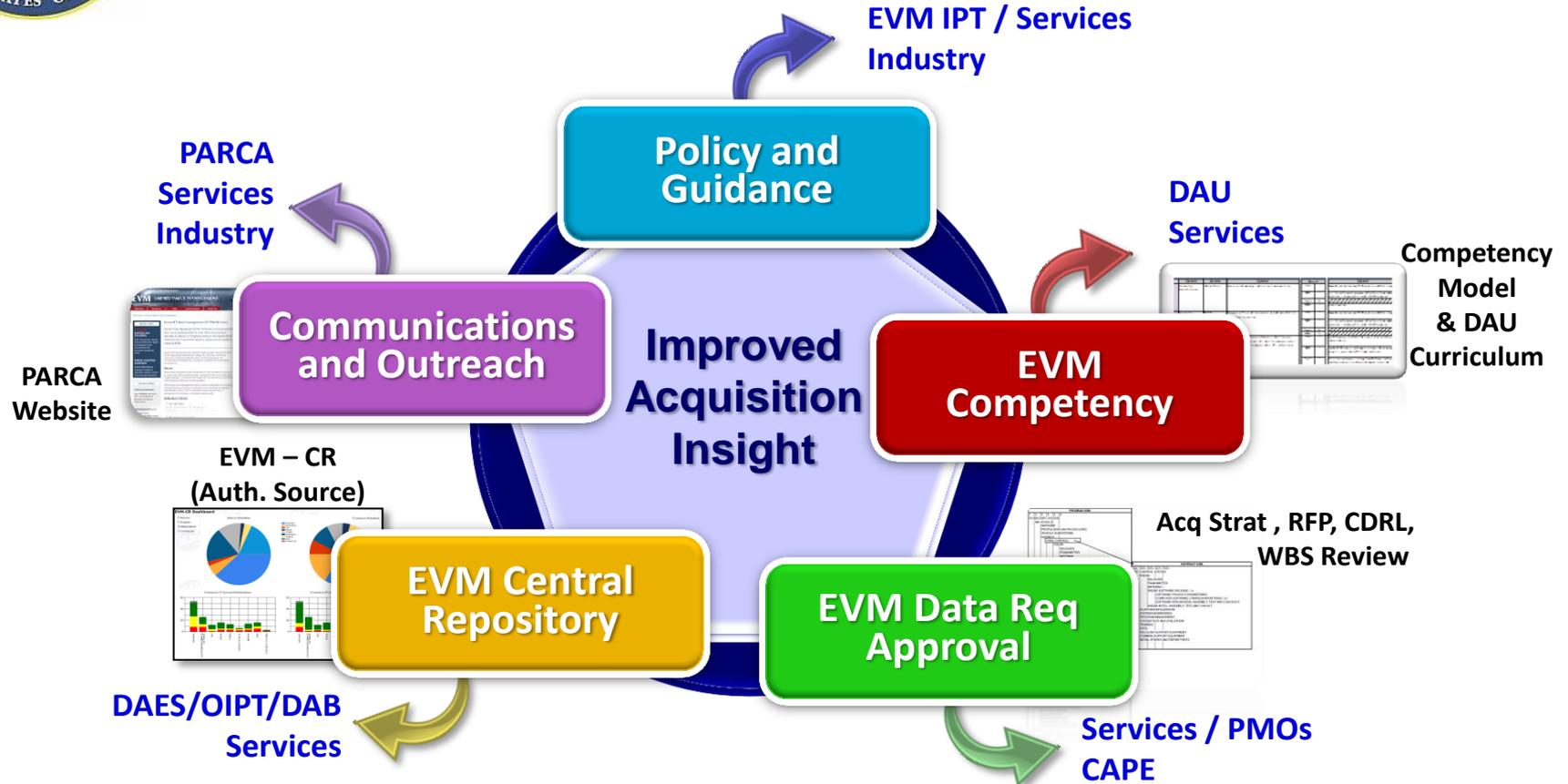
- ▶ Earned Value Management (EVM) is a management tool that is fully embraced by the DoD acquisition community.
- ▶ Guiding Principles:
 - Increase the quality and utility of EVM data.
 - Increase the use of EVM across the acquisition chain.
 - Improve acquisition professionals ability to utilize EVM.
 - Reduce Contractor's administrative burden of inefficient use of EVM.
 - Ensure constructive 2-way communication between DoD and Industry.
 - EVMS is perceived by all stakeholders to be cost effective.

PARCA EVM Authorities Memo was signed 10 Aug 2011.





PARCA EVM Duties & Inter-Relationships





EVM REQUIREMENTS SUMMARY



DFARS Requirements

- ▶ **234.201 Policy.**

- ▶ (1) DoD applies the earned value management system requirement as follows:
 - (i) For cost or incentive contracts and subcontracts valued at \$20,000,000 or more, the earned value management system shall comply with the guidelines in the American National Standards Institute/Electronic Industries Alliance Standard 748, Earned Value Management Systems (ANSI/EIA-748).
 - (ii) For cost or incentive contracts and subcontracts valued at \$50,000,000 or more, the contractor shall have an earned value management system that has been determined by the cognizant Federal agency to be in compliance with the guidelines in ANSI/EIA-748.

- ▶ **252.234-7001 Notice of Earned Value Management System.**

- Requirement For EVM/EVMS

- ▶ **252.234-7002 Earned Value Management System.**

- Requirements for the EVM System



PARCA Authorities in Data Requirements

- ▶ Advisor on EVM Application
- ▶ August 10, 2011 EVM Authorities Memo
 - “Review and approve EVM data requirements for MDAP Programs...”
 - “Resolve differences in interpretation of EVM policy, practice, and requirements among Components...”

Purpose of Data Req. Review:

1. Ensure proper application of EVM and EVM requirements  *Review Contract Scope*
2. Reduce economic burden of implementation and use of EVM  *Tailor the IPMR*
3. Assist in determining the proper level of detail for the WBS  *Working with PMO & CAPE*



PARCA Authorities in Data Requirements

▶ PARCA EVM duties includes EVM Data Requirements Approval and as an Advisor on EVM Application

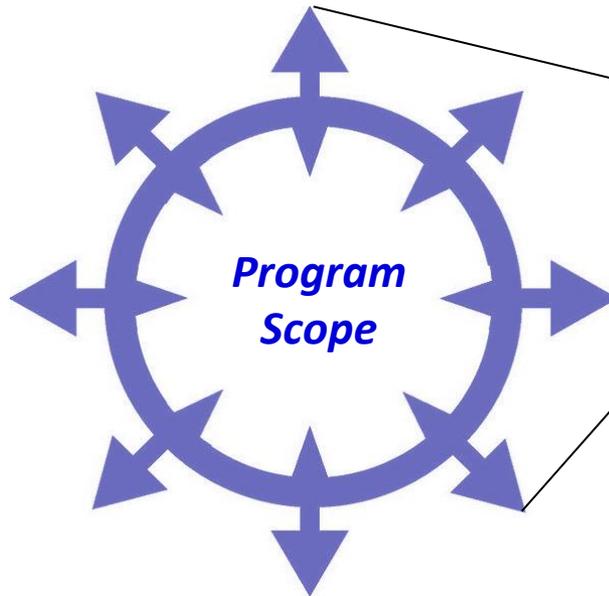
- *“Review and approve EVM data requirements for MDAP Programs...”*
- *“Resolve differences in interpretation of EVM policy, practice, and requirements among Components...”*

Purpose of Data Req. Review:

1. Ensure proper application of EVM  *Review Contract Scope*
2. Reduce economic burden of EVM & EVMS  *Tailor the IPMR*
3. Assist in determining proper level of WBS  *Working with PMO & CAPE*



Determination of EVM Applicability



PARCA is working on a Policy and/or Guidance update on determining EVM applicability on contracts

Part or all of the scope would benefit from the rigors of EVM in program management



Check contract type and value, related efforts, and if a schedule could be run thru the efforts



Validate with color of money and how the contract fits with the bigger picture of the overall Program



Tailoring Request Process

▶ Tailoring Process

- Request from PM comes into appropriate level EVM Focal
 - ACAT I – PARCA is the EVM Focal
 - ACAT II, III, & IV – Service/Agency is the EVM Focal
 - PARCA will set expectations for lower ACATs and will monitor implementation.
- EVM Focal works with PMO to determine appropriate deviation or tailoring.
- EVM Focal documents concurrence or non concurrence with recommended approach to the decision authority.
- PMO executes to direction of the decision authority.



PARCA Tailoring Review Criteria

▶ Work Scope

- Development, T&M or Services?
- Multiple Task Orders in a single contract (ID/IQ)?
 - Are task orders independent or related (i.e., can you pull an IMS thread through the task orders)?
 - Are single task orders over the dollar threshold?

▶ Period of Performance

- Effort is greater or less than 12 months.
- If ID/IQ, then is a single task order or related task orders greater or less than 12 months.

▶ Dollar Value

▶ Contract Type



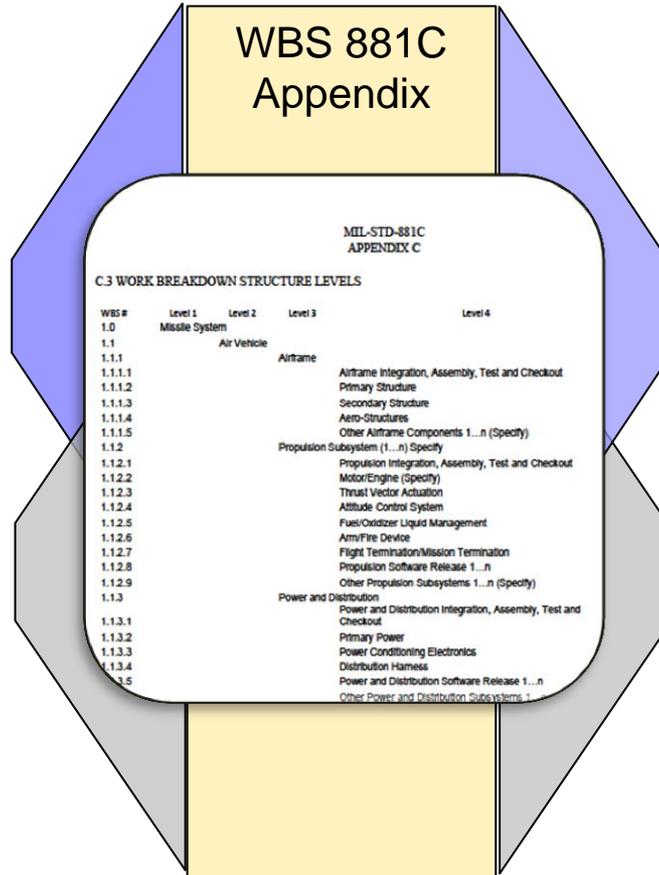
Work Breakdown Structure

Earned Value

By WBS,
Show Format
1 Extract

CSDR

By WBS,
Show CSDR
Extract,
showing
recurring and
non-recurring
for example



TPMs

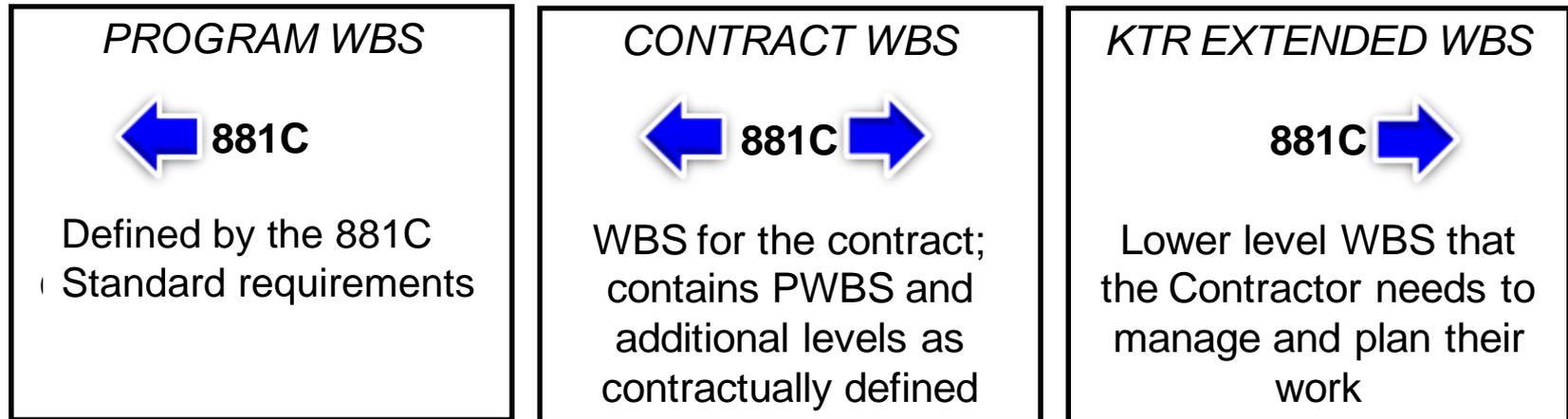
By WBS,
Show WBS
Tree with Size
and Weight
and
specification
allocations

Design
documentation

By WBS,
Show Phase
Picture of
Products from
documents to
wire diagrams
to solid
diagrams



WBS Development



PARCA is working with CAPE on reviewing EVM requirements and WBS structures invoked in major DoD acquisitions.



IPMR OVERVIEW BY FORMAT



IPMR DID Overview

- ▶ IPMR DID officially released 19 June 2012
- ▶ The IPMR DID is effective 1 July
- ▶ Merger of prior IMS and CPR DIDs
 - Merged IMS and CPR. Old CPR is sections 3.2-3.6, IMS is section 3.7, and new Format 7 id section 3.8
- ▶ Integration of schedule and cost
- ▶ Support electronic submission of data (DoD approved XML)
 - Optional language for hours, human readable, control account level, and subcontractor reports



CPR & IMS = IPMR

CPR DID

DATA ITEM DESCRIPTION

TITLE: CONTRACT PERFORMANCE REPORT (CPR)
 NUMBER: DI-MGMT-81466A
 AMSC NUMBER: D7549
 DTIC APPLICABLE:
 PREPARING ACTIVITY: OUSD(AT&L)ARA/AM(SO)

APPROVAL DATE: 20050330
 LIMITATION:
 GIDEP APPLICABLE:

APPLICABLE FORMS: DD Forms are available and shall be used to submit required formats as follows:

CPR Format DD Form Number Sample Format No.
 Work Breakdown Structure 2734/1 1
 Organizational Categories 2734/2 2
 Baseline 2734/3 3
 Staffing 2734/4 4

EXPLANATIONS AND

ITEM	CURRENT PERIOD			CUMULATIVE TO DATE			REPROGRAM ADJUSTMENTS			AT COMPLETION	
	BUDGETED COST	ACTUAL COST	VARIANCE	BUDGETED COST	ACTUAL COST	VARIANCE	ADJUSTED COST	ADJUSTED COST	ADJUSTED COST	BUDGETED COST	ACTUAL COST
1. CONTRACT COST	17,448	17,448	0	17,448	17,448	0	17,448	17,448	17,448	17,448	17,448
2. PERSONNEL COST	1,440	1,440	0	1,440	1,440	0	1,440	1,440	1,440	1,440	1,440
3. MATERIALS COST	1,440	1,440	0	1,440	1,440	0	1,440	1,440	1,440	1,440	1,440
4. OTHER COSTS	1,440	1,440	0	1,440	1,440	0	1,440	1,440	1,440	1,440	1,440
5. UNRESTRICTED BUDGET	17,448	17,448	0	17,448	17,448	0	17,448	17,448	17,448	17,448	17,448
6. RESTRICTED BUDGET	0	0	0	0	0	0	0	0	0	0	0
7. MANAGEMENT RESERVE	0	0	0	0	0	0	0	0	0	0	0
8. TOTAL	17,448	17,448	0	17,448	17,448	0	17,448	17,448	17,448	17,448	17,448

IPMR DID

DATA ITEM DESCRIPTION

TITLE: IPMR Integrated Program Management Report (IPMR)
 NUMBER: DI-MGMT-81466B
 AMSC NUMBER: D7549
 DTIC APPLICABLE:
 PREPARING ACTIVITY: OUSD(AT&L)PARCA

APPROVAL DATE: Draft
 LIMITATION:
 GIDEP APPLICABLE:

APPLICABLE FORMS: DD Forms are available and shall be used to submit required formats as follows:

IPMR Format DD Form Number.
 Work Breakdown Structure 2734/1 1
 Organizational Categories 2734/2 2
 Baseline 2734/3 3
 Staffing 2734/4 4



IMS DID

DATA ITEM DESCRIPTION

TITLE: INTEGRATED MASTER SCHEDULE (IMS)
 NUMBER: DI-MGMT-81650
 AMSC NUMBER: D7544
 DTIC APPLICABLE:
 PREPARING ACTIVITY: OUSD(AT&L)ARA/AM(SO)

APPROVAL DATE: 20050330
 LIMITATION:
 GIDEP APPLICABLE:

APPLICABLE FORMS: None

USE/RELATIONSHIP: schedule contains successful program; Integrated Master Structure (IMS) verify attainable; Meeting program with all related modification, applied to full

Task	Task Name	Start	Finish
1	Program Event	Wed 8/29/07	Fri 9/7/07
2	Program Event Completed	Fri 9/7/07	Fri 9/7/07
3	Significant Accomplishment 1	Wed 8/29/07	Fri 9/7/07
4	(SA) Significant Accomplishment Completed 2	Fri 9/7/07	Fri 9/7/07
5	Accomplishment Criteria 1.1	Tue 9/4/07	Fri 9/7/07
6	(AC) Accomplishment Criteria Completed	Fri 9/7/07	Fri 9/7/07
7	Task 1.1.1	Wed 8/29/07	Wed 9/5/07
8	Task 1.1.2	Tue 9/4/07	Tue 9/4/07
9	Task 1.1.3	Wed 9/5/07	Wed 9/5/07
10	Task 1.1.4	Thu 9/6/07	Thu 9/6/07
11	Accomplishment Criteria 1.2	Fri 9/7/07	Fri 9/7/07
12	(AC) Accomplishment Criteria Completed	Mon 9/3/07	Mon 9/3/07
13	Task 1.2.1	Wed 9/26/07	Wed 9/26/07
14	Task 1.2.2	Thu 9/20/07	Thu 9/20/07
15	Task 1.2.3	Fri 9/21/07	Fri 9/21/07
16	Task 1.2.4	Mon 9/3/07	Mon 9/3/07

DATA ITEM DESCRIPTION

TITLE: UN/CEFACT
 NUMBER: DI-MGMT-81466C
 AMSC NUMBER: D7549
 DTIC APPLICABLE:
 PREPARING ACTIVITY: OUSD(AT&L)PARCA

APPROVAL DATE: Draft
 LIMITATION:
 GIDEP APPLICABLE:

APPLICABLE FORMS: DD Forms are available and shall be used to submit required formats as follows:

UN/CEFACT Format DD Form Number.
 Work Breakdown Structure 2734/1 1
 Organizational Categories 2734/2 2
 Baseline 2734/3 3
 Staffing 2734/4 4

UN/CEFACT



IPMR DID Application

- ▶ The DID is applied with DFARS 252.52-7001/7002.
- ▶ Generally full IPMR is applicable for incentive/award contracts greater than \$20M.
 - Format 6 and the associated Format 5 analysis are separable and may be applicable when EVM is not required.
- ▶ Currently the CPR and IMS are referenced in 5000.02 and DAG.
 - Will be updated to reflect new DID.
- ▶ IMS may be separately applied – see section 2.8.2 in the IPMR DID for applicable formats and sections.



General DID Information

► Major Changes:

- All formats shall be submitted electronically in accordance with the DOD-approved XML schemas
- Reporting Level. The reporting level is defined consistent with MIL-STD-881 (current version in use at time of contract award), as applicable.
- Human Readable. The Government may, in the CDRL, require Formats 1-4 in human readable format down to the reporting level as additional, separate submissions.
- Default is Formats 1-6 monthly and Format 7 annually
- Options for hours, subcontract reports, control account level Format 1.
- Standardized reporting between Formats 1 & 2 and between 3 & 4, and all formats with Format 5.



DID Topical Matrix

General Topic Areas	2005	Oct 2012	Feb-Apr 2012	Jun 2012
<i>Reporting Frequency</i>	12WD (up to 17WD)	10WD 1-4, 6; 13 Fmt 5	Various versions: - 13th CD - 12th WD, Format 5 on 15th WD - 12WD (up to 17WD)	12WD (up to 17WD)
<i>WBS Consistency</i>	Mil-HDBK-881 and CWBS DID, CCDR as applicable	MIL -STD 881, CWBS DID, CSDR	MIL -STD 881	The submission of Format 1 data shall utilize a product-oriented WBS at the level established by tailoring the appropriate MIL-STD-881 appendix
<i>Reporting Level</i>	Normally Level 3 or lower	Control Account consistent with MIL-STD 881	Control Account consistent with MIL-STD 881	MIL-STD 881, CA/HRs Optional
<i>Reporting Format</i>	X12 or Contractor Format	UN/CEFACT	DOD Approved XML Guideline	DoD Approved XML Guideline
<i>Cost/Sched Integ.</i>	CPR DID shall be used in conjunction with the Integrated Master Schedule (IMS) DID, DI-MGMT-81650	Joint IPMR DID (merged CPR and IMS)	Joint IPMR DID (merged CPR and IMS)	Joint IPMR DID (merged CPR and IMS)
<i>Variance Analysis</i>	Explain all variances that exceed specified variance thresholds	Top 15	Top 15	Top 15



DID Topical Matrix by Format

	2005	Oct 2012	Feb-Apr 2012	Jun 2012
By Format				
<i>Format 1</i>	No descope discussion	No format change; definitional and clarification items for EACs, AUW, etc.	No format change; definitional and clarification items for EACs, AUW, etc.	No format change; definitional and clarification items for EACs, AUW, etc.
<i>Format 2</i>		Definitions consistent with Format 1	Definitions consistent with Format 1	Definitions consistent with Format 1
<i>Format 3</i>	Greyed changes section	Add total line (row) to Format	"Un-gray" of monthly changes; removed total line	"Un-gray" of monthly changes
<i>Format 4</i>		No format change; option hours or EQH	No format change, option hours or EQH	No format change, option hours or EQH
<i>Format 5</i>		Revised Structure, linked IMS	Revised Structure, Enhanced Schedule Reporting	Revised Structure, Enhanced Schedule Reporting
<i>Format 6</i>	New in 2005	Various definitions, terms, and clarifications added, Justify Relationships, Constraints, Lags	Various definitions, terms, and clarifications added, Justify Relationships, Constraints, Lags	Various definitions, terms, and clarifications added, Justify Late and some early Constraints, Lags, Schedule Margin clarified
<i>Format 7</i>	ACAT 1 CR History File	ACAT 1 CR History File	Format 7 added; history and timephased info at CA level	Format 7 added; history and timephased info Format 1 level



Format 1 Header

CLASSIFICATION (When Filled In)									
CONTRACT PERFORMANCE REPORT FORMAT 1 - WORK BREAKDOWN STRUCTURE							DOLLARS IN		FORM APPROVED OMB No. 0704-0188
<small>The public reporting burden for this collection of information is estimated to average 3.1 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.</small>									
1. CONTRACTOR			2. CONTRACT			3. PROGRAM		4. REPORT PERIOD	
a. NAME			a. NAME			a. NAME		a. FROM (YYYYMMDD)	
b. LOCATION (Address and ZIP Code)			b. NUMBER			b. PHASE		b. TO (YYYYMMDD)	
			c. TYPE			d. SHARE RATIO		c. EVMS ACCEPTANCE NO YES (YYYYMMDD)	
5. CONTRACT DATA									
a. QUANTITY	b. NEGOTIATED COST	c. ESTIMATED COST OF AUTHORIZED UNPRICED WORK	d. TARGET PROFIT/FEE	e. TARGET PRICE	f. ESTIMATED PRICE	g. CONTRACT CEILING	h. ESTIMATED CONTRACT CEILING	i. DATE OF OTB/OTS (YYYYMMDD)	
6. ESTIMATED COST AT COMPLETION					7. AUTHORIZED CONTRACTOR REPRESENTATIVE				
MANAGEMENT ESTIMATE AT COMPLETION			CONTRACT BUDGET BASE	VARIANCE		a. NAME (Last, First, Middle Initial)		b. TITLE	
(1)			(2)	(3)					
a. BEST CASE						c. SIGNATURE		d. DATE SIGNED (YYYYMMDD)	
b. WORST CASE									
c. MOST LIKELY									
8. PERFORMANCE DATA									

Best, Worst, & Most Likely EACS

Authorized, Unpriced Work, Estimated Price, Estimated Contract Ceiling, etc.



Format 1 Body

8. PERFORMANCE DATA																
ITEM	CURRENT PERIOD					CUMULATIVE TO DATE					REPROGRAMMING ADJUSTMENTS			AT COMPLETION		
	BUDGETED COST		ACTUAL COST	VARIANCE		BUDGETED COST		ACTUAL COST	VARIANCE		COST VARIANCE	SCHEDULE VARIANCE	BUDGET	BUDGETED	ESTIMATED	VARIANCE
	WORK SCHEDULED	WORK PERFORMED	WORK PERFORMED	SCHEDULE	COST	WORK SCHEDULED	WORK PERFORMED	WORK PERFORMED	SCHEDULE	COST						
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12a)	(12b)	(13)	(14)	(15)	(16)
a. WORK BREAKDOWN STRUCTURE ELEMENT																
b. COST OF MONEY																
c. GENERAL AND ADMINISTRATIVE																
d. UNDISTRIBUTED BUDGET																
e. SUB TOTAL (PERFORMANCE MEASUREMENT BASELINE)																
f. MANAGEMENT RESERVE																
g. TOTAL																
9. RECONCILIATION TO CONTRACT BUDGET BASE																
a. VARIANCE ADJUSTMENT																
b. TOTAL CONTRACT VARIANCE																

Cost of Money, G&A, Indirects

WBS, CWBS, MIL-STD-881, Reporting Structure

Performance Data Clarifications



Format 2

CONTRACT PERFORMANCE REPORT FORMAT 2 - ORGANIZATIONAL CATEGORIES												DOLLARS IN			FORM APPROVED OMB No. 0704-0188		
<small>The public reporting burden for this collection of information is estimated to average 6 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.</small>																	
1. CONTRACTOR				2. CONTRACT				3. PROGRAM				4. REPORT PERIOD					
a. NAME				a. NAME				a. NAME				a. FROM (YYYYMMDD)					
b. LOCATION (Address and ZIP Code)				b. NUMBER				b. PHASE				b. TO (YYYYMMDD)					
				c. TYPE				d. SHARE RATIO				c. EVMS ACCEPTANCE NO YES (YYYYMMDD)					
5. PERFORMANCE DATA																	
ITEM (1)	CURRENT PERIOD					CUMULATIVE TO DATE					REPROGRAMMING ADJUSTMENTS			AT COMPLETION			
	BUDGETED COST		ACTUAL COST	VARIANCE		BUDGETED COST		ACTUAL COST	VARIANCE		COST VARIANCE	SCHEDULE VARIANCE	BUDGET	BUDGETED	ESTIMATED	VARIANCE	
	WORK SCHEDULED (2)	WORK PERFORMED (3)	WORK PERFORMED (4)	SCHEDULE (5)	COST (6)	WORK SCHEDULED (7)	WORK PERFORMED (8)	WORK PERFORMED (9)	SCHEDULE (10)	COST (11)	(12a)	(12b)	(13)	(14)	(15)	(16)	
a. ORGANIZATIONAL CATEGORY																	
b. COST OF MONEY																	
c. GENERAL AND ADMINISTRATIVE																	
d. UNDISTRIBUTED BUDGET																	
e. SUB TOTAL (PERFORMANCE MEASUREMENT BASELINE)																	
f. MANAGEMENT RESERVE																	
g. TOTAL																	

Cost of Money, G&A, Indirects

Organizational categories,



Format 3

1. CONTRACTOR			2. CONTRACT			3. PROGRAM			4. REPORT PERIOD						
a. NAME			a. NAME			a. NAME			a. FROM (YYYYMMDD)						
b. LOCATION (Address and ZIP Code)			b. NUMBER			b. PHASE			b. TO (YYYYMMDD)						
			c. TYPE			d. SHARE RATIO			c. EVMS ACCEPTANCE NO YES (YYYYMMDD)						
5. CONTRACT DATA															
a. ORIGINAL NEGOTIATED COST			b. NEGOTIATED CONTRACT CHANGES		c. CURRENT NEGOTIATED COST (a. + b.)		d. ESTIMATED COST OF AUTHORIZED UNPRICED WORK		e. CONTRACT BUDGET BASE (c. + d.)		f. TOTAL ALLOCATED BUDGET	g. DIFFERENCE (e. - f.)			
h. CONTRACT START DATE (YYYYMMDD)			i. CONTRACT DEFINITIZATION DATE (YYYYMMDD)			j. PLANNED COMPLETION DATE (YYYYMMDD)		k. CONTRACT COMPLETION DATE (YYYYMMDD)		l. ESTIMATED COMPLETION DATE (YYYYMMDD)					
6. PERFORMANCE DATA															
ITEM	BCWS CUMULATIVE TO DATE	BCWS FOR REPORT PERIOD	BUDGETED COST FOR WORK SCHEDULED (BCWS) (Non-Cumulative)										UNDISTRIBUTED BUDGET	TOTAL BUDGET	
			SIX MONTH FORECAST						ENTER SPECIFIED PERIODS						
(1)	(2)	(3)	+1 (4)	+2 (5)	+3 (6)	+4 (7)	+5 (8)	+6 (9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)
a. PERFORMANCE MEASUREMENT BASELINE (Beginning of Period)															
b. BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD															
c. TOTAL BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD															
d. PERFORMANCE MEASUREMENT BASELINE (End of Period)															
7. MANAGEMENT RESERVE															
8. TOTAL															

Planned, Estimated and Contract Completion Dates

Total Changes; Changes by Month



Format 4

CONTRACT PERFORMANCE REPORT FORMAT 4 - STAFFING											FORM APPROVED OMB No. 0704-0188			
<p>The public reporting burden for this collection of information is estimated to average 5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.</p>														
1. CONTRACTOR			2. CONTRACT				3. PROGRAM				4. REPORT PERIOD			
a. NAME			a. NAME				a. NAME				a. FROM (YYYYMMDD)			
b. LOCATION (Address and ZIP Code)			b. NUMBER				b. PHASE				b. TO (YYYYMMDD)			
			c. TYPE		d. SHARE RATIO		c. EVMS ACCEPTANCE							
							NO YES (YYYYMMDD)							
5. PERFORMANCE DATA (All figures in whole numbers)														
ORGANIZATIONAL CATEGORY	ACTUAL CURRENT PERIOD	ACTUAL END OF CURRENT PERIOD (Cumulative)	FORECAST (Non-Cumulative)											
			SIX MONTH FORECAST BY MONTH (Enter Names of Months)						ENTER SPECIFIED PERIODS					AT COMPLETION
(1)	(2)	(3)	+1 (4)	+2 (5)	+3 (6)	+4 (7)	+5 (8)	+6 (9)	(10)	(11)	(12)	(13)	(14)	(15)
6. TOTAL DIRECT														

Organizational Categories

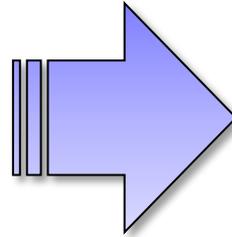
Staffing Estimates; Units & Clarifications



DID Benefit – Format 5 Reduction



Current Format 5 language can create burdensome variance reporting



New language intended to reduce burden and focus on the significant risks to the program



Format 5

▶ Major Changes:

– Top 15 WBS approach to Variance Analysis

- Allowed for Government Selection or a defined contractor process that covers all aspects (current, cumulative and at-complete)
- Allowed contractor or government to temporarily increase the number of reported variances to cover emerging trends

– Linked Formats 1-4 and 6 discussions to format 5

- Significant Format 6 changes. Require SRA, Health Assessment and drivers as applicable be put into the Format 5

– Requirement to reconcile best/worst/most likely EAC

▶ Other Information

- Contractor format for delivery
- Delivered with the monthly Formats 1-4, & 6



Format 6

▶ Major Changes:

- Defined minimum level of subcontractor integration in Prime IMS
- Definition of Schedule Margin & SVTs included
- Required disclosing of justification for Leads, Lags and most constraints.
- Defined minimum fields in IMS
 - Some were part of 2005 DID with additions
 - Definitions updated/clarified in various cases
 - Can be provided in the IMS with any method that allows for Govt sorting and filtering.
- Expanded when SRA is required and how it is reported

▶ Other Information

- IMS required monthly to the PMO & EVM-CR for ACAT I's



Format 6

▶ Other Information Continued

- Consistency with Format 1 Addressed; included “The WBS numbering system in the IMS must be consistent with the Format 1 structure.”
- Schedule Margin defined as allowed before program events
- Critical & Driving Paths
 - Included definition that tasks with “0” or negative total float are not by default the critical path.
 - Driving path and interim milestones defined (not in 2005).
 - Excessive constraints and incomplete, incorrect, or overly constrained logic shall be avoided.
- Relationships & Float
 - All non-constrained discrete tasks/activities/milestones shall have at least one predecessor and successor, except the start and end of the program.



IMS Field List Comparison

Task Name	Start	Finish	Miles	% Compl	Dur	Early Start	Early Finish	Late Start	Late Finish	Baselin Start	Baselin Finish	Total Float	Free Float	Decess	ccesso	Contro lccoun	Min ldu	Max Rdur	Criti	Constraint Type	Constrain Date	Just Lag	Just Constr	Sub ID	OBS	Work P	EVT	WBS	Driv Path
1 - Sample Program	Mon 8/29/11	Je 12/17/11	No	0%	575 d	#####	#####	#####	#####	Mon 8/29/11	Tue 12/1/11	0 d	0 d				0 d	0 d	Yes	As Soon As Possible	NA								

Common in 2005 IMS DID & IPMR DID

- | | |
|--------------------|---|
| 1. Task Name | 12. Baseline Finish |
| 2. Start | 13. Total Float |
| 3. Finish | 14. Free Float |
| 4. Milestone | 15. Successors |
| 5. % Complete | 16. Predecessors |
| 6. Duration | 17. Control Account |
| 7. Early Start | 18. Minimum Rdur (Optimistic Duration) |
| 8. Early Finish | 19. Maximum Rdur (Pessimistic Duration) |
| 9. Late Start | 20. Critical Path |
| 10. Late Finish | 21. Constraint Type |
| 11. Baseline Start | 22. Constraint Date |

New To IPMR DID

1. Justify Lag
2. Justify Constraint
3. Sub ID
4. OBS
5. Work Package
6. EVT
7. WBS
8. Driving Path



Format 7

- ▶ Not part of 2005 IMS or CPR DID
 - Replaces need for wInsight historical file
 - Meets requirement for historical file for ACAT I Programs in the EVM-CR
 - Also provides time-phased BCWS, BCWP, ACWP, ETC from contract award to completion as applicable.
 - Must reconcile with Format 1 BAC and EAC for the same period.
 - Due as a minimum annually, at the same time in the month as the other formats.
 - At the same reporting level as Format I unless otherwise negotiated.
 - Supported by it's own DoD approved XML Schema and guideline.



IPMR Guide & CDRL

- ▶ Draft guide published to PARCA Website
 - Has tailoring guidance and amplification in certain areas, with examples.
 - Meant to supplement and clarify, but not change, the DID content.

- ▶ OSD IPMR CDRL being developed
 - Contains default positions for tailorable items
 - Services may also have draft CDRLs that contain service level issue tailoring items.



References

1. PARCA Website: <http://www.acq.osd.mil/parca/>
2. PARCA EVM Website: <http://www.acq.osd.mil/evm/>
3. PARCA EVM Issue & Interpretation: <http://www.acq.osd.mil/evm/ir/index.shtml>
4. EVM-CR Website: <http://dcarc.cape.osd.mil/EVM/EVMOverview.aspx>
5. DAU EVM Community Of Practice (COP) Website:
<https://dap.dau.mil/cop/evm/Pages/default.aspx>
6. DCMA EVMS Standard Surveillance Instruction (SSI):
<http://guidebook.dcma.mil/79/index.cfm>
7. DFARS
 - Notice of Earned Value Management System (Apr 2008):
<http://www.acq.osd.mil/dpap/dars/dfars/html/current/252234.htm#252.234-7001>
 - Earned Value Management System (May 2011):
<http://www.acq.osd.mil/dpap/dars/dfars/html/current/252234.htm#252.234-7002>
 - Contractor Business Systems (May 2011):
<http://www.acq.osd.mil/dpap/dars/dfars/html/current/252242.htm#252.242-7005>
8. IPMR: https://assist.dla.mil/quicksearch/basic_profile.cfm?ident_number=278901



IPMR BACKUP SLIDES



Format 1

▶ Major Changes:

- Format form is unchanged
- WBS reporting level tied to 881C as starting point

▶ Other Information

– AUW/UB/MR

- Can never be negative
- Require de-scope to be reported in Format 5 until removed from the time-phased PMB.
- Clarified MR and scope issue

– Added options to G&A and COM reporting to reconcile with DCARC requirements

– Removed WBS and CCDR linkage



Format 1

▶ Other Information Continued

– EACs

- Best Case most favorable conditions. Not linked to official Ktr position
- Worst Case least favorable conditions.
- Best Case most likely and official contractor position. Supersedes the column 15 LRE.
- Difference in assumptions between EACs including column 15 must be discussed in Format 5.

– OTB/OTS and Reprogramming Guidance provided

– G&A and COM add/non-add and may be specified by the Government

– Negotiated Cost – Definitized changes only



Format 2

▶ Major Changes:

- Format form is unchanged
- Format 2 OBS not required to match Format 4 reporting

▶ Other Information

- Format 2 required by OBS instead of WBS
- Include subcontractors and material if applicable; can be non-add
- Linked discussions of elements between Formats 1 and 2
- UB & MR match Format 1



Format 3

- ▶ Major Changes:
 - Format form is changed; un-greyed baseline changes section

- ▶ Other Information
 - Provides insight into changes to baseline going forward
 - Provide discussions of changes to Format 5
 - Still contains projected finish date and variances but information clarified



Format 4

- ▶ Major Changes:
 - Format form is unchanged
 - Format 4 OBS not required to match Format 2 reporting

- ▶ Other Information
 - Staffing information can be in hours or EQH
 - Major profile changes to be explained in Format 5



Format 5

▶ Other Information

– Report structure is defined in the following order:

- 1) Contract Summary - Significant changes that could impact technical, schedule, or cost objectives.
- 2) Formal Reprogramming Analysis - Discuss the Authorization, Reason, Mechanics implemented
- 3) EAC Analysis - Explain the assumptions, methodologies between Best/Worst/ and Most Likely EACs
- 4) UB Analysis - Explain the content of the UB balance and changes within the reporting period
- 5) MR Analysis - Explain the sources and uses of MR changes and the WBS elements allocated as applicable.



Format 5

► Other Information

– Report structure is defined in the following order:

6) IMS Discussion –

- Top 3 Critical and Top 3 Driving Paths
- Total Contract Baseline Variance
- Changes between the Baseline and Forecast duration of Schedule Margin
- Changes to the Task Activity Codes or Data Dictionary
- Internal Schedule Health Analysis results

7) Format 3 Discussions - Significant changes, phasing, or totals

8) Format 4 Discussions - Significant changes, phasing, or totals

9) Cost and Schedule Variance Analysis

10) Supplemental Discussions.

- IBR Dates completed or proposed in next 6 months
- Schedule Risk Assessment (SRA) results in past month
- Assumptions, results, actions, and impact on EAC.
- Contractual De-scopes, if any. Discuss how th de-scope is reported.
- G&A and COM Specify if cost are included or are reference.